

These **Sample Proposal Preparation Instructions** originate from the on-line PBSA course developed through a partnership between the Institute for Supply Management (ISM), the National Contract Management Association (NCMA), and the Department of Defense. The copyrights are held by the ISM and NCMA. Copyright permission has been granted for use in USACCE's Center of Excellence for Service Contracting.

PROPOSAL PREPARATION INSTRUCTIONS

The responsibility of the source selection official in a competitive acquisition is to select the offeror, who will provide the best value to the Government, for contract award. Since there may be a fine distinction between the best proposal and the firm that will provide the best service, the source selection official may frequently be placed in a position of applying experienced judgment in making a difficult decision. Such decision making is facilitated through the highest quality proposal preparation instructions and evaluation factors for award.

Section L of the solicitation contains the instructions to offerors. The most important aspect of this section is the proposal preparation instructions we provide to the offerors. Proposal preparation instructions should be brief, clearly written, unambiguous, and request only the information which is essential in making the best value source selection decision. With the possible exception of electronic proposals and oral presentations, the implementation of streamlining initiatives and acquisition reform has been slow in this section of the solicitation.

The following hints for acquisition reform of proposal preparation instructions will assist acquisition professionals in improving Navy services solicitations:

- a. It is inappropriate to restate law or regulation. The FAR should not be repeated or paraphrased in the proposal preparation instructions. FAR clauses should be incorporated by reference in Section L, as appropriate.
- b. Brevity and clarity are very important in drafting the proposal preparation instructions. Write in plain English, only say it once, and edit it down.
- c. The relative importance of the evaluation factors for award is properly stated in Section M. They are inappropriate in the proposal preparation instructions.
- d. The text of the proposal preparation instructions should not repeat information in the introduction. Redundancy is neither desired nor required. Say it once.
- e. Military specification type paragraph numbering systems (1.1.1, 1.1.2, 1.1.3, 1.2.1, etc) are inappropriate in the proposal preparation instructions.
- f. It is unnecessary to spell out a number and also put it in brackets, for example: three (3).
- g. Do not use the words "offeror" and "contractor" interchangeably in the proposal preparation instructions. Until the contract is awarded, the firm is an offeror on the instant procurement; however, they have past performance experience as a contractor on other earlier awards.

h. Do not use the words "proposal" and "offer" interchangeably in the proposal preparation instructions.

i. Avoid using optional terms like "should" in the proposal preparation instructions. The intent of proposal preparation instructions is to get industry proposals which can be evaluated on an "apples to apples" basis. An optional term will likely result in the evaluation of "fruit salad" proposals.

j. Avoid providing so much detail in the proposal preparation instructions that it effectively results in a leveling of technical proposals. Good offerors know what is important and will cover the salient points in their proposals.

k. The labor category descriptions are not an appropriate topic to include in the proposal preparation instructions. The labor category descriptions provide a benchmark for contract performance; however, the proposal preparation instructions do not become part of the resultant contract.

l. Do not let inflexibility govern the oral presentations. Limiting viewgraphs to black and white, dictating the font and type size of slides, and limiting the offeror to only two presenters are examples of unnecessary bureaucracy which is creeping into some proposal preparation instructions.

m. Only ask for the information that is truly necessary in order to make a best value source selection decision. Requesting superfluous and nice to have information is very costly to the offerors and the Government. Streamlining must begin with the proposal preparation instructions.